



**Getting Started with
my|CalPERS
Direct Authorization Vendors**

August 2011

Getting Started with my|CalPERS – Direct Authorization Vendors

Introduction

Welcome to my|CalPERS!

The Public Employer Readiness Team (PERT) has prepared this document, *Getting Started with my|CalPERS – Direct Authorization Vendors*, to highlight things our Direct Authorization Vendor business partners need to do or be aware of once they begin using the new my|CalPERS system. This document contains a checklist of activities, references to related resource materials, reminders, important dates to consider, and a Transition Guide, which specifies what will happen to processes currently used by Direct Authorization Vendors after the launch of my|CalPERS.

Easy Does It!

Using a new system can be a bit overwhelming at first, and we understand that you will have questions, may encounter errors, and may see things in the system that do not make sense. Rest assured that CalPERS staff will be available to support you and will continue to provide readiness assistance and training opportunities over the next few months.

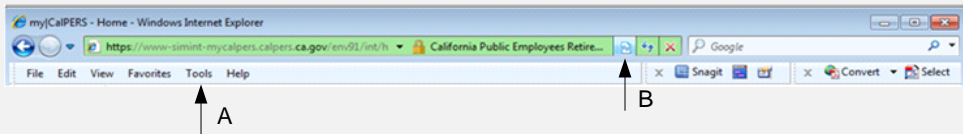
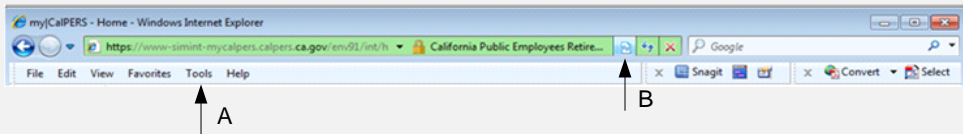
Once my|CalPERS launches on September 19, 2011, CalPERS staff will need to get accustomed to the new system, as well as process a backlog of data. We ask that you take this into consideration and have patience during the first few weeks after my|CalPERS launches. Our CalPERS Customer Contact Center and PERT anticipate a high volume of calls and you may experience longer than usual wait times. It is recommended that you prioritize your requests for assistance. If your question or issue is not time-critical, you may want to wait for the initial call volume to subside. Deduction requests for the November 1 warrant are not due until October 12, so we encourage you to take advantage of the extra time and ease into processing your data.

During the first month after my|CalPERS launches, there will be a significantly greater than normal amount of data being processed that had been temporarily suspended during the system conversion period. Processing this data could affect the response time for processing Deduction Request files.

We have established some guidelines for our Direct Authorization Vendors who will be submitting electronic files and/or processing online transactions, so that you will know what to expect during the first month after launch:

- **All Direct Authorization Vendors**– Expect at most a 48-hour turnaround for processing of Deduction request files and online transactions. This timeline will fluctuate based on the volume and priority of concurrent transactions being processed through my|CalPERS.
- **FTP Deduction Requests** – Expect an email notification after successfully submitting a file, but status may not be available on the File Upload History page for up to 48 hours.
- **All File Reporter Direct Authorization Vendors** - If processing time is expected to exceed 48 hours, expect to receive notification from CalPERS. If you don't see your file process right away, please do not submit the file again. Wait for the file to process or to receive notification from CalPERS regarding a delay.

The checklists on the following pages highlight things that Direct Authorization Vendors need to do and/or be aware of once they begin using my|CalPERS.

PREPARING TO USE MY CALPERS				
Navigating to my CalPERS	Are you able to navigate to my CalPERS?	<div></div>		
	<table><tr><td>YES</td><td>Welcome to my CalPERS!</td></tr><tr><td>NO</td><td><p>https://my.calpers.ca.gov is the link that will take you to my CalPERS, where you will first indicate whether you are a business partner or a participant and then be taken to the <i>Business Partner Login</i> page, where you will proceed with logging in to my CalPERS.</p><div><p>Note: This link will not be activated for access to the business partner landing page until my CalPERS is launched on September 19, 2011. Prior to September 19, the link takes you to my CalPERS for participants.</p></div><div><p>Resource(s):</p><ul style="list-style-type: none">See <i>Appendix A</i> at the end of this document for detailed instructions on how to log in to my CalPERS for the first time.</div></td></tr></table>		YES	Welcome to my CalPERS!
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Browser Compatibility	When you are logged into my CalPERS, are all features (buttons, tabs, text, etc.) displayed properly on your screen?	<div></div>		
	<table><tr><td>YES</td><td>No action required.</td></tr><tr><td>NO</td><td><p>There may be issues with the version and/or settings for the browser that you are currently using to access my CalPERS. Internet Explorer v8 and Firefox v3.6 or above should be compatible.</p><p>For example, if the “Home” tab is partially cut-off on the left side and you are:</p><ul style="list-style-type: none">Using Internet Explorer v8 - navigate to the “Tools” menu in your Internet Explorer v8 window and select “Compatibility View” (arrow A). You will then be able to turn this view off by selecting the icon in the address window (arrow B) in order to see the entire “Home” tab.<div></div><ul style="list-style-type: none">Using an older version of Internet Explorer – download the free upgrade to Internet Explorer v8 by selecting this link:<ul style="list-style-type: none">http://windows.microsoft.com/en-US/internet-explorer/downloads/ie-8. Do not upgrade to Internet Explorer v9.<p>If you are still having problems with Internet Explorer, or if your organization requires that you use a different browser, you can download Mozilla Firefox for free by selecting this link:</p><ul style="list-style-type: none">http://www.mozilla.com/en-US/firefox/new/.</td></tr></table>		YES	No action required.
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System Access Administrator (SAA)	<p>Did your agency identify a System Access Administrator (SAA)? The SAA refers to the individual who has responsibility for the management of user access to my CalPERS for your organization.</p> <table border="1"> <tr> <td data-bbox="329 310 418 359">YES</td><td data-bbox="418 310 1411 359">Your SAA needs to change their password the first time they log in to my CalPERS.</td></tr> <tr> <td data-bbox="329 359 418 436">NO</td><td data-bbox="418 359 1411 436">Have the person you designated to be your SAA contact PERT at CalPERS_PERT4U@calpers.ca.gov to get set up in my CalPERS.</td></tr> </table>	YES	Your SAA needs to change their password the first time they log in to my CalPERS.	NO	Have the person you designated to be your SAA contact PERT at CalPERS_PERT4U@calpers.ca.gov to get set up in my CalPERS.	<input type="checkbox"/>
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NO	Have the person you designated to be your SAA contact PERT at CalPERS_PERT4U@calpers.ca.gov to get set up in my CalPERS.					
Setting up Business Contacts & Granting System Access	<p>Did your agency's SAA set up business contacts for your agency, create user IDs and grant them system access?</p> <table border="1"> <tr> <td data-bbox="329 787 418 898">YES</td><td data-bbox="418 787 1411 898">Contact your SAA for your username and temporary password. You will need to create a new password and provide responses to security questions the first time you log in to my CalPERS.</td></tr> <tr> <td data-bbox="329 898 418 1157">NO</td><td data-bbox="418 898 1411 1157"> <p>Once your agency's SAA has been established in my CalPERS, the SAA can set up business contacts and grant them system access.</p> <div data-bbox="435 1014 1395 1136"> <p>Resource(s):</p> <ul style="list-style-type: none"> • my CalPERS Guide to Adding New Contacts in the PERT area of CalPERS On-Line </div> </td></tr> </table>	YES	Contact your SAA for your username and temporary password. You will need to create a new password and provide responses to security questions the first time you log in to my CalPERS.	NO	<p>Once your agency's SAA has been established in my CalPERS, the SAA can set up business contacts and grant them system access.</p> <div data-bbox="435 1014 1395 1136"> <p>Resource(s):</p> <ul style="list-style-type: none"> • my CalPERS Guide to Adding New Contacts in the PERT area of CalPERS On-Line </div>	<input type="checkbox"/>
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Trusted Site Setup for my CalPERS Reports	<p>Will you be generating reports in my CalPERS?</p> <table border="1"> <tr> <td data-bbox="329 1352 418 1583">YES</td><td data-bbox="418 1352 1411 1583"> <p>Add <i>Cognos</i>®, a system reporting tool in my CalPERS, as a trusted site to your web browser.</p> <div data-bbox="435 1430 1395 1551"> <p>Resource(s):</p> <ul style="list-style-type: none"> • See Appendix B at the end of this document for detailed instructions on how to add <i>Cognos</i>® as a trusted site to your browser. </div> </td></tr> <tr> <td data-bbox="329 1583 418 1631">NO</td><td data-bbox="418 1583 1411 1631">No action required.</td></tr> </table>	YES	<p>Add <i>Cognos</i>®, a system reporting tool in my CalPERS, as a trusted site to your web browser.</p> <div data-bbox="435 1430 1395 1551"> <p>Resource(s):</p> <ul style="list-style-type: none"> • See Appendix B at the end of this document for detailed instructions on how to add <i>Cognos</i>® as a trusted site to your browser. </div>	NO	No action required.	<input type="checkbox"/>
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NO	No action required.					

File Transfer Protocol (FTP) Connectivity Setup	<p>If you are planning on using File Transfer Protocol (FTP) to submit electronic files (Deduction Request files) in my CalPERS, has your FTP connectivity been established?</p> <table border="1"> <tr> <td data-bbox="329 321 418 373">YES</td> <td data-bbox="418 321 1411 373">No action required.</td> </tr> <tr> <td data-bbox="329 373 418 447">NO</td> <td data-bbox="418 373 1411 447">Contact PERT at CalPERS_PERT4U@calpers.ca.gov to initiate the setup process for FTP. Please be aware that this process can take up to six weeks.</td> </tr> </table> <p>Note: You can submit files via the file upload process in my CalPERS in the interim while your FTP connectivity is being established.</p>	YES	No action required.	NO	Contact PERT at CalPERS_PERT4U@calpers.ca.gov to initiate the setup process for FTP. Please be aware that this process can take up to six weeks.	<input type="checkbox"/>
YES	No action required.					
NO	Contact PERT at CalPERS_PERT4U@calpers.ca.gov to initiate the setup process for FTP. Please be aware that this process can take up to six weeks.					
Email Notifications for FTP File Reporters	<p>Will you be using File Transfer Protocol (FTP) to submit electronic files (Deduction Request files) in my CalPERS and receiving electronic response files via FTP from my CalPERS?</p> <table border="1"> <tr> <td data-bbox="329 783 418 1024">YES</td> <td data-bbox="418 783 1411 1024"> <p>Set up a “System Support” contact type in my CalPERS to receive email notifications regarding FTP response file availability.</p> <p>Resource(s):</p> <ul style="list-style-type: none"> • my CalPERS Guide to Adding New Contacts in the PERT area of CalPERS On-Line </td> </tr> <tr> <td data-bbox="329 1024 418 1077">NO</td> <td data-bbox="418 1024 1411 1077">No action required.</td> </tr> </table>	YES	<p>Set up a “System Support” contact type in my CalPERS to receive email notifications regarding FTP response file availability.</p> <p>Resource(s):</p> <ul style="list-style-type: none"> • my CalPERS Guide to Adding New Contacts in the PERT area of CalPERS On-Line 	NO	No action required.	<input type="checkbox"/>
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NO	No action required.					

PROCESSING PAYMENTS		
Establish Electronic Funds Transfer (EFT) Account in my CalPERS	Do you use, or wish to use, the EFT Debit method to make payments in my CalPERS?	
	YES	Discontinue using paycalifornia.com. The CalPERS link on paycalifornia.com will be unavailable after September 16, 2011, and future dated payments will be deleted. You will need to establish your EFT account and routing number in my CalPERS prior to making your first payment.
	NO	No action required.
	Do you wish to use the EFT Credit method to make payments in my CalPERS?	
YES	You will need to submit a user agreement for the EFT credit method. Upon receipt of the agreement, CalPERS will provide you with file specifications for your financial institution to initiate payment. <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p>Resource(s):</p> <ul style="list-style-type: none"> New Electronic Fund Transfer (EFT) Authorization Agreement – Credit Method will be available at launch on CalPERS On-Line. </div>	<input type="checkbox"/>
NO	No action required.	

REMINDERS		
my CalPERS Training	<p>If you haven't already done so, please make sure you register and take our my CalPERS training, so that you receive the instructions you need to continue conducting business with CalPERS and help ensure a smooth transition and continuity in services.</p> <p>Resource(s):</p> <ul style="list-style-type: none"> my CalPERS Training Registration <p>(These resources are located in the Business Partner area of CalPERS On-Line)</p>	<input type="checkbox"/>
November 1 Warrant	<p>Deduction requests for deduction changes beginning on the November 1 warrant are due on October 12.</p>	<input type="checkbox"/>
MISCELLANEOUS INFORMATION		
Sending Documents to CalPERS	<p>Mailing address for sending documents to CalPERS Headquarters:</p> <p>California Public Employees' Retirement System P.O. Box 942715 Sacramento, CA 94229-2715</p> <p>Fax number for faxing documents to CalPERS Headquarters: 800-959-6545</p> <p>Note: Some CalPERS program areas may still provide their own PO box and fax number for a more direct routing of correspondence.</p>	<input type="checkbox"/>

Transition Guide

The purpose of the Transition Guide is to outline changes affecting forms used by employers as a result of the my|CalPERS implementation. There are three possible scenarios for what happens to each form:

- **Use Existing Form** – use the existing form just like you have in the past
- **Online Functionality** – the form is being replaced by an online transaction that you will use in my|CalPERS instead of using a paper form
- **New Form in my|CalPERS** – the old form is being replaced by a new online form available within my|CalPERS.

NAME OF FORM BEFORE MY CALPERS	FORM ID	WHAT HAPPENS POST LAUNCH		COMMENTS
		File Functionality	Online Functionality	
Direct Authorization Deduction Request	PRS-346	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<i>Add, Update and Delete transactions submitted via File Upload or FTP will process. Add and Update transactions submitted online will process. Online processing to delete current deductions will be done by CalPERS at launch.</i>
Deduction Register	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<i>Files transmitted in XML via FTP only. Online access allows download of file in various formats.</i>


Appendix A

INSTRUCTIONS Logging into my|CalPERS

- Open Internet Explorer.
- Navigate to my|CalPERS using this link: <https://my.calpers.ca.gov>
- Follow the instructions below to log in to my|CalPERS for the first time.

From the my|CalPERS *Log In* page, select the **Business Partner** radio button, then select the **Continue** button.

my|CalPERS
Help | Contact Us | CalPERS On-Line August 31, 2011



my|CalPERS Resources and Training Available

Valuable resources and training are available to help you get started in using the new my|CalPERS system. Please use the links below to access our readiness resources, as well as register for our specialized training to help you learn how to use my|CalPERS:

- Employers, visit the PERT area of CalPERS On-Line at <http://www.calpers.ca.gov/pert>.
- Direct Authorization Vendors, health plan business partners, and dental plan carriers, visit the Business Partners area of CalPERS On-Line at www.calpers.ca.gov/mycalperspartners.

We are here to assist and guide you as you begin experiencing my|CalPERS and all that it has to offer.

New User?
Registering is easy. [Register Now](#)

Business Partner Login * Required

Please log in with your Username and Password.

* User Name:

* Password:

[Log In](#)

[Forgot Your Password?](#)

Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Copyright © 2011 | [Privacy Policy](#) | [Conditions of Use](#) | [Site Requirements](#)

Enter your **User Name** and **Password**.

my|CalPERS
Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line April 04, 2011

Update Your Challenge Questions * Required Fields

Please modify your Challenge questions and answers below:

Question 1: * Who is your personal hero?

Answer 1: * My dad

Question 2: * What was the name of your best childhood friend?

Answer 2: * Linda

Question 3: * In what city would you like to retire?

Answer 3: * Maui

Question 4: * Who was your first employer?

Answer 4: * CalPERS

Question 5: * What is your favorite movie?

Answer 5: * ET

[Save and Continue](#) [Clear](#)

Copyright | Conditions of Use | Site Requirements
Build: 110707_185634_v1_BPR.5610 Datasource: student095ds Server: ENV89_node2

For security, select your five challenge questions and answers. Then select the **Save and Continue** button.

Skip to: Content | Footer | Welcome los angeles cc | Customize | Help | Contact Us | CalPERS On-Line | Log out **April 04, 2011**

my|CalPERS

Conditions of Use for Business Partners (Employers)

By accessing this application you acknowledge that all information accessible to you will be used only to assist you in conducting official business with CalPERS.

Copyright | Conditions of Use | Site Requirements
Build: 110707_185634_v1_BPR.5610 Datasource: student095ds Server: BWB9_node2 UID: 897

Select the **Accept** button.

Skip to: Content | Footer | Welcome School | Customize | Help | Contact Us | CalPERS On-Line | Log out **December 27, 2010**

my|CalPERS

Home Profile Reporting Person Information Loan Eligibility Search Education Other Organizations

My Home Requests

Common Tasks

- Reports
- Document History
- Inquiry List
- Submit Inquiry

Menu

- Person Search
- Change Password
- Change Challenge Questions

Select the Next button to continue.

Welcome

Welcome to my|CalPERS, your gateway to conducting business electronically with CalPERS. Here you will find information on system news, new features and upcoming events.

Important Messages

- Tax statements were mailed on January 31, 2011.
- Health statements will be mailed to employees in July, prior to Open Enrollment.

My Cases

Case ID	Case Title	Case Type	Program	Status
63683		Initiate SIP Agreement		Closed
63419		Initiate Retirement Contract		Closed
63012		Initiate SIP Agreement		Closed

Health Plan ZIP Search

To find out which CalPERS health plans are available in your area, enter the information below and select Search to display results.

ZIP Code:

Member Category: ☒ State/CSU ☐ Public Agency/School

Year:

CalPERS MARKET VALUE

\$228.3 billion
Reflects market value as of close on 03/10/2011
[View By Asset Class >>](#)

QUICK LINKS

CalPERS Quick Picks

- [CalPERS On-Line](#)
- [Edit Quick Links >>](#)

Publications Center

Placeholder for Targeted Program Information

CalPERS News

- Mar 1 [CalPERS Appoints Chief Risk Officer](#)
- Feb 28 [CalPERS OPEB Trust Earns 13.4% in 2010](#)
- Feb 23 [Apple Shareholders Back CalPERS Proposal for Majority Vote in Board Director Elections](#)

[Go to Press Room >>](#)

Copyright | Conditions of Use | Site Requirements

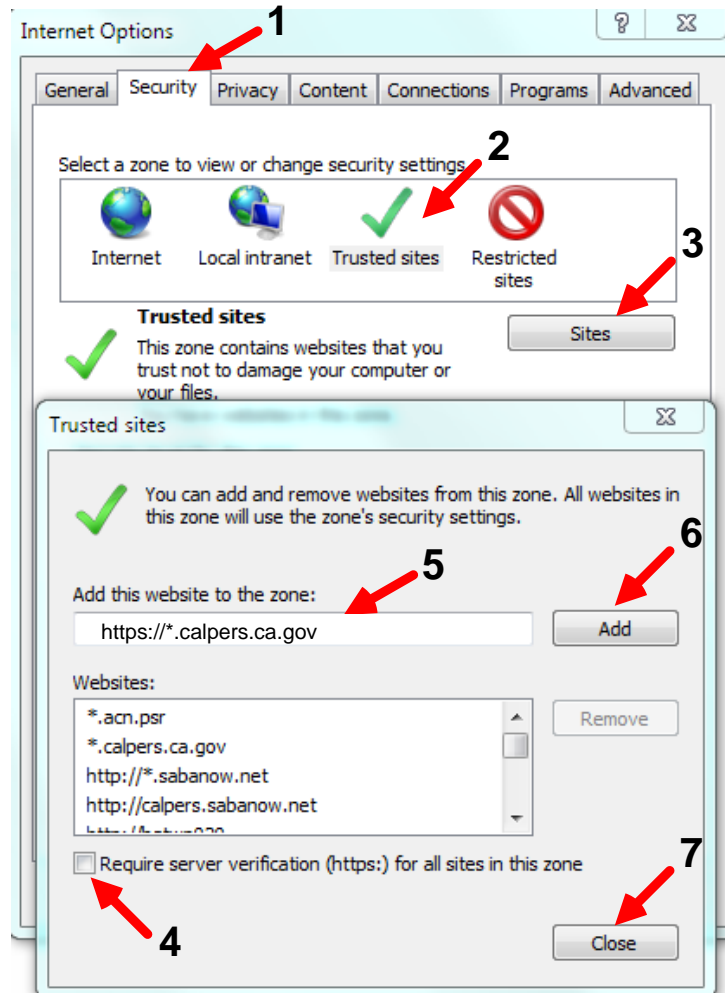
Welcome to the Business Partners my|CalPERS *Home* Page!

Appendix B

INSTRUCTIONS

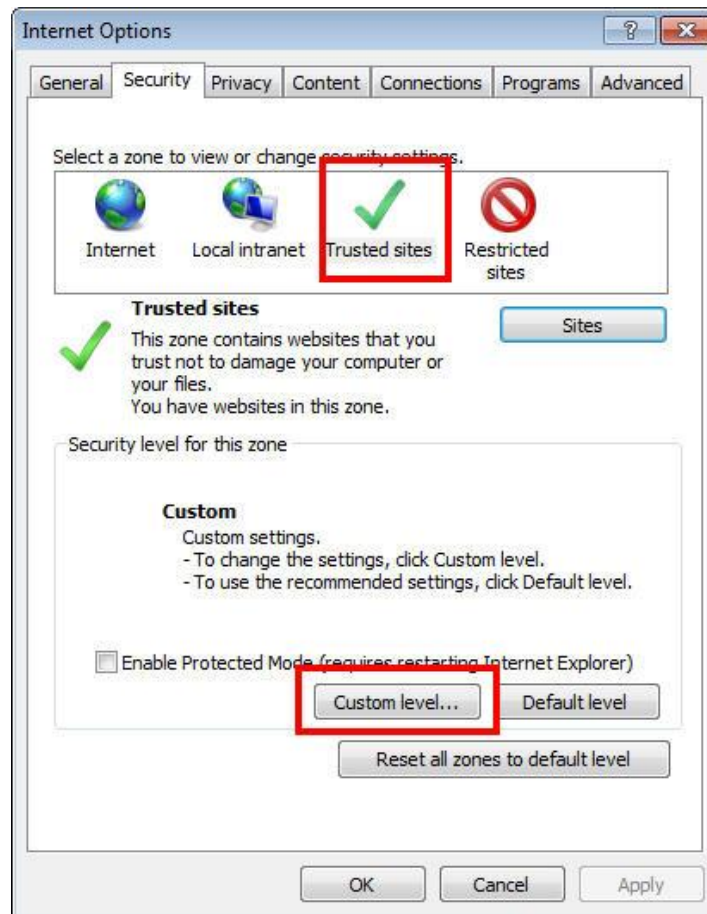
Add *Cognos*®, a system reporting tool in my|CalPERS, as a trusted site to your web browser.

- Open Internet Explorer.
- On the Menu Bar, select **Tools** and then select **Internet Options**.
- Follow the instructions below to add *Cognos*® as a trusted site.



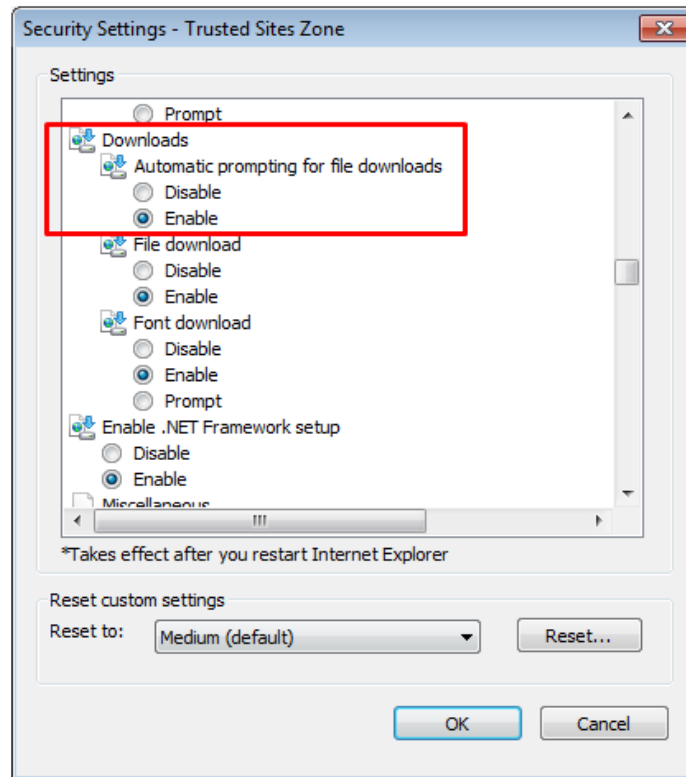
1. Select **Security** Tab.
2. Select **Trusted Sites**.
3. Select **Sites**.
4. Make sure the box is *not checked*.
5. Enter **https://*.calpers.ca.gov** to add this website to the zone.
6. Select **Add**.
7. Select **Close**.

Follow the instructions below to modify the options of the Trusted Sites zone and set the "Enable XSS Filter" property to "Disable."

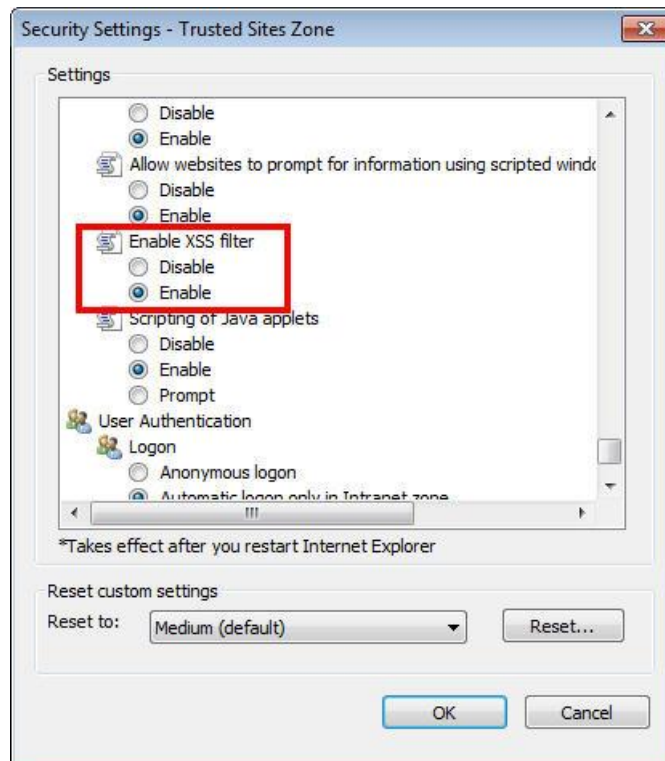


Back on the 'Internet Options' dialog, with 'Trusted Sites' still selected, select the **Custom Level** button.

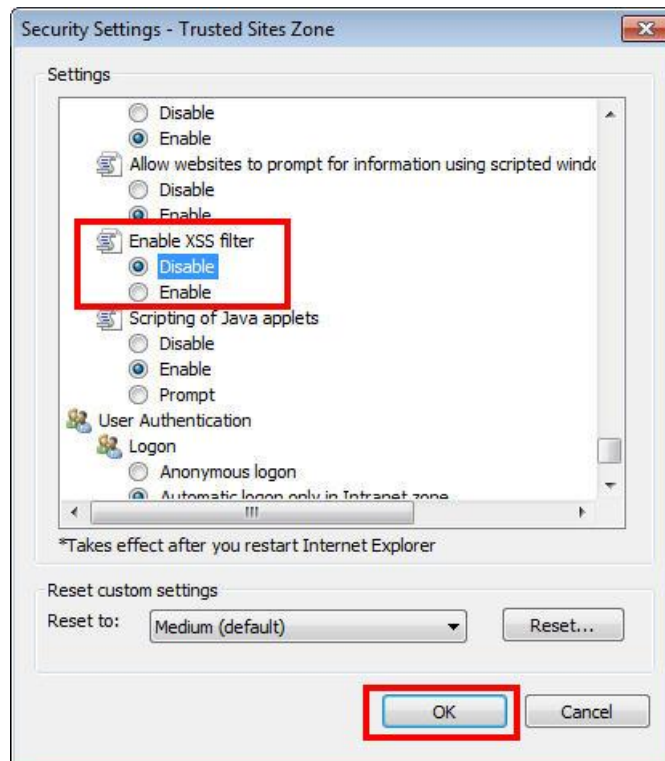
In the 'Security Settings' dialog, scroll down to find the 'Downloads' setting.



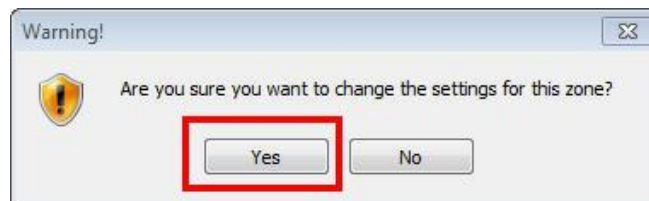
Change the setting for 'Automatic prompting for file downloads' from 'Disable' to 'Enable.'



Continue scrolling down to find the 'Enable XSS filter' setting.



Change the setting for 'Enable XSS filter' from 'Enable' to 'Disable', then select **OK**.



When prompted to change settings for this zone, select **Yes**.



Back on the 'Internet Options' dialog, select **OK**.